



California Institute for Mental Health

Advanced Mental Health Board 101: Evaluating Mental Health Programs *And* Developing An Annual Board Report

March 7, 2012
5:00 pm – 7:30 pm

Presented by: Donna Matthews, MSW, Associate 2, CiMH

ANNOUNCEMENTS!

Please join us for the next Webinar on

**Co-Occurring Disorders:
Integrated Dual Diagnosis Treatment**

Saturday, 4/7/2012
10:00 AM – 12:30 PM

Reserve your Webinar seat now at:
<https://www1.gotomeeting.com/register/162714113>

Purpose of Training

- Review the statutory roles and responsibilities of Local Mental Health Boards and Commissions (LMHBCs) related to evaluation of services and Annual Reports;
- Provide practical strategies for evaluating mental health services and producing an annual report of the LMHBC; and
- Increase LMHBC success in reviewing, evaluating and making recommendations.
- Highlight the benefits of partnerships with local mental health departments and community.

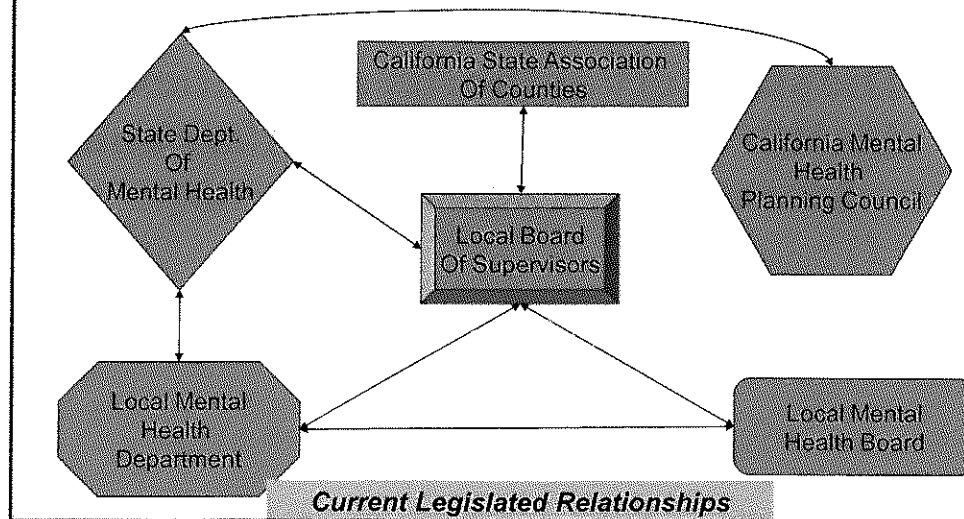
Training Objectives:

As a result of participating, individuals will be able to:

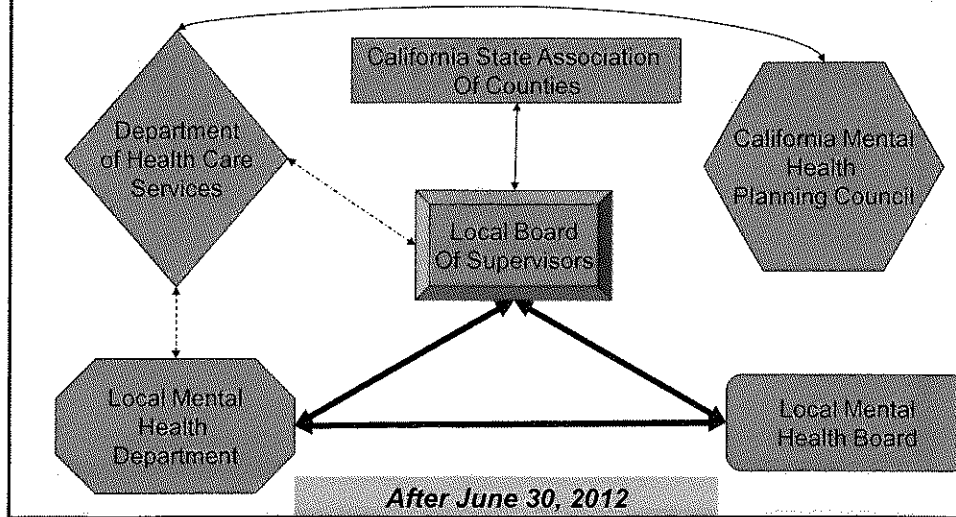
- Describe the three primary functions of LMHBCs.
- Identify two key strategies to evaluate mental health services.
- Describe three basic components of a Board Annual Report.
- Define the value to creating a Board “work plan”
- Develop a sample LMHBC work plan.
- Draft a sample LMHBC recommendation that may be included in an annual report of the LMHBC.

Setting the Context for LMHBCs: Statewide Structure and Statutory Requirements

Where do LMHB/Cs fit in the Mental Health “structure”.



Where do LMHB/Cs fit in the Mental Health “structure”.



The statutory authority and duties of LMHBCs are outlined in Welfare and Institutions Code Section 5604.2

The local mental health board **shall do all of the following:**

- 1) **Review and evaluate the community's mental health needs, services, facilities and special problems;**
- 2) Review any County agreements entered into pursuant to Welfare and Institutions Code Section 5650;
- 3) **Advise the governing body and the local mental health director as to any aspect of the local mental health program;**
- 4) Review and approve the procedures used to ensure citizen and professional involvement at all stages of the planning process;

The local mental health board **shall do all of the following (continued)**

5. **Submit an annual report to the governing body on the needs and performance of the County's mental health system;**
6. Review and make recommendations on applicants for the appointment of the local director of mental health services. The Commission shall be included in the selection process prior to the vote of the governing body;
7. Review and comment on the County's performance outcome data and communicate its findings to the California Mental Health Planning Council;
8. Perform additional duties and / or exercise additional authority transferred to the Mental Health Board by the governing body.

And the local mental health board **shall do all of the following (continued)**

(b) It is the intent of the Legislature that, as part of its duties **pursuant to subdivision (a)**, the board shall assess the impact of the realignment of services from the state to the county, on services delivered to the clients and on the local community.

Primary functions:

- * Oversee and monitor the local mental health system
- * Advocate for individuals with serious mental illness
- * Provide advice to the BOS and the local mental health director
- * Ensure the development of improved services, access to services and the best mental health program possible.
- ❖ **Review, evaluation and make recommendations**

Part One: Evaluating Mental Health Services and Programs

Start with Getting Organized

**Identify
Goals**

**Assess
Needs**

**Evaluate
Programs**

Identify Goals for the Board

- Creates a focus for the Board.
- Establishes annual expectations of Board.
- Translates into annual work plan.
- Goals provide a basis for your LMHBC and others to understand what the LMHBC is doing and why.

“Does my LMHBC have Annual Goals?”

- If “yes”:
 - Do the goals suggest specific community needs to assess?
 - Do the goals indicate specific mental health services or programs to evaluate?
- If “no”:
 - Create goals around needs and services even if they are broad.

Examples of Goals:

- Specific Goal:
 - Evaluate the supportive services for youth [given rise in bullying in schools.]
- Broad Goal:
 - Identify programs for addressing the mental health needs of older adults.

Start with Getting Organized

Identify
Goals

Assess
Needs

Evaluate
Programs

Assessing the Mental Health Needs of the Community

- Creates a basis for prioritizing what services and programs to evaluate; and
- Creates a venue for learning what we do not know yet;
- Assures we understand the needs of the community;
- Creates transparency with the community.

How can my Board assess the mental health needs of the community?

- Hold community forums
- Conduct community surveys
- Conduct focus groups
- Review community data
- Review already gathered information from previous needs assessments
- Request reports from program directors

Examples of Assessment Strategies:

- Create an Ad hoc Committee to plan needs assessment strategies;
- Conduct County Mental Health Board Town Hall Meeting;
- Review of MHSA Stakeholder Meetings Reports;
- Presentation of Performance Report to Board by Mental Health Director;
- Cultural Community Focus Groups to assess access to services.

Start with Getting Organized

**Identify
Goals**

**Assess
Needs**

**Evaluate
Programs**

Reviewing and Evaluating public mental health services:

- Based on the Board Goals; and/or
- Based upon assessment of needs;
- Create a work plan to review and evaluate services;
- Work in collaboration with the County Mental Health Director.*

*Statute requires that the Chairman on the Board be in communication with the Mental Health Director.

Evaluation Strategies regarding public mental health services:

- Review of Outcome Reports;
- Review of MHSA Reports;
- Invite presentations to Board;
- Site Visits and Evaluations;
- Others...?

Discussion Question:

How does your Mental Health Board or Commission currently evaluate services?



“Musts” of Site Evaluations:

- Prioritize how many sites to evaluate and target those that address goals or needs;
- Determine capacity of the Board to do evaluations;
- Determine Logistics (timing, other activities of the Board);
- Coordinate any site visits with Mental Health Director and/or county liaison.

Preparing for Evaluations

- Assure non-disruption of services;
- Assure HIPPA compliance is not impacted;
- Respect for privacy of service recipients;
- Prepare or Identify information gathering strategies; and
- Prepare or Identify evaluation tools (forms, checklists).

Sample Site Evaluation Form - Instructions

SITE VISIT GUIDELINES
RIVERSIDE COUNTY MENTAL HEALTH BOARD

PURPOSE/GOAL:

- A) For the individual Board Member to obtain an understanding and knowledge of a single program offered by their region.
- B) To provide a verbal report to their board and a written report available to all boards with sufficient detail to allow the other board members to obtain a general knowledge of the program.
- C) To become the contact person/liaison on the board for that specific programs needs or promotion.

PROCESS & PROCEDURE:

Selection and Assignment of Programs

- 1) Once a year the Chairperson will request 3 program preferences from each Board Member, of those programs they would be interested in visiting.
- 2) The Executive Committee will review the requests and assign each board member to a program based on the preferences noted. Please note--board members may not be assigned to a program in which they are participating or have a family member participating.
- 3) A copy of the assignments will be given to the Regional Manager who will notify the Supervisors of the programs.

Scheduling the Visit

- 4) The Board Member should make the first call to begin the site visit process.
 - a) Call the Program Supervisor to schedule the site visit. This should be done at least two weeks prior to the time you would like to make the site visit. The site visit will take a minimum of one

This information is an excerpt from a page document provided courtesy Riverside County MH Board

Sample Site Evaluation Form

SITE VISIT REPORT

RIVERSIDE COUNTY BOARD OF MENTAL HEALTH

DATE OF SITE VISIT: _____

☐ DESERT REGION
☐ MID-COUNTY REGION
☐ WESTERN REGION

REVIEWED BY: _____
Board Member Name

This report is based on a personal visit from one of the members of the Regional Board of Mental Health. The information provided is based on educating the other board members and general public regarding the services being provided to the mentally ill in their Region of Riverside County.

FACILITY/PROGRAM REVIEWED:

PROGRAM SUPERVISOR/CONTACT (Name & Phone #):

BACKGROUND HISTORY OF PROGRAM (why and when did it start):

GOALS OF THE PROGRAM (what is it for?):

LOCATION:

1) Street Address and cross streets:

2) description of surrounding area, for example other businesses nearby, bus stops, etc:

3) where visitors can park:

4) description of where the main entrance is and/or where visitors would go:

PROGRAM TYPE(S): (Check all appropriate boxes)

☐ Outpatient ☐ Inpatient ☐ Day Treatment ☐ Residential ☐ Other _____

This information is an excerpt from a page document provided courtesy Riverside County MH Board

Sample Site Evaluation Form

continued

-
-
- OVERALL IMPRESSION OR VERY BRIEF SUMMARY: (include key positive/negative points)
-
- BOARD MEMBER OR PROGRAM STAFF RECOMMENDATIONS FOR PROGRAM NEEDS:
-
-
-

This information is an excerpt from a page document provided courtesy Riverside County MH Board

After the Site Visit

Reporting out – in writing and verbally - to your Board

- Use the official Report Form and fill it out by typing or printing with black ink. Be as brief and concise as possible. Emphasize the key aspects of the program in the written report.
- You will be required to present your review at one of the monthly board meetings. During your verbal report you may want to mention some of the more minor details from your site visit notes that could not be included in your written report due to lack of space.
- Your written report will be distributed to the board during the meeting you present your verbal report. On that day please bring in enough copies for all board members plus a few extra (18-20).
- The verbal report should give the board a basic understanding of the program even without the written report.

This information is an excerpt from a page document provided courtesy Riverside County MH Board

Creating a Board or Commission Work Plan

Components of a Work Plan:

1. **Who** People; Committees to carry out work
2. **What** Activities
3. **Where** Logistics information
4. **When** Timeline for activity and dates
5. **How** Identify what else is needed
6. **Why?** Relate it to your Roles and Responsibilities; Board Goals

Sample Activities in a Work Plan:

i.e. Identifying Activities

- Conducting Public Meetings;
- Annual Meetings and Retreats;
- Needs Assessments;
- Participation on Committees (internal and external);
- Evaluations and Site Visits;
- Attending Community Events;
- Meeting with Mental Health Director;
- Board of Supervisors' Meetings

Types of Work Plans:

- **Written Narrative** addressing each of the components.
- **A Calendar** – a practical and visual tool that can be posted at each meeting and provided to each member.
- **A Timeline** – another practical and visual tool for showing the activities of the Board in fulfilling statutory roles and responsibilities.
- **A Matrix** – another organizational document.

Sample Work Plan:

who	what	where	when	how	why
Miguel	Site Visit – meet with Prog. Mgr.	County Wellness Center	March 15, 2012 at 10AM	—	Goal: evaluate peer run program
Sheron	Site Visit – Meet with Clinic Dir.	Hmong Women's Clinic	May 1, 2012 at noon	With Site Visit AdHoc Committee member	Goal: evaluate services for Hmong community
Fatima	Site Visit – Meet with Clinical Supervisor, Peer Staff	La Familia Counseling Center	May 18, 2012 at 9AM		Goal: evaluate services for Latino Youth and Families

Evaluating the Work Plan:

1. Is there Capacity on the Board / Committees to carry out activities?
2. Does the Work Plan make sense?
3. Is one person or a few people doing most of the work?
4. How and are we maintaining our wellness?
5. **How will the Board share the results of site visit?**

Infuse Accountability into the Work Plan:



Who	What	Where	When	How	Why	Report to MHB
Miguel	Site Visit – meet with Prog. Mgr.	County Wellness Center	March 15, 2012 at 10AM	—	Goal: evaluate peer run program	Regular MHB Meeting: April 1, 2012
Sheron	Site Visit – Meet with Clinic Dir.	Hmong Women's Clinic	May 11, 2012 at noon	With Site Visit AdHoc Committee member	Goal: evaluate services for Hmong community	Regular MHB Meeting: June 1, 2012
Fatima	Site Visit – Meet with Clinical Supervisor, Peer Staff	La Familia Counseling Center	July 18, 2012 at 9AM		Goal: evaluate services for Latino Youth and Families	Regular MHB Meeting: August 1, 2012

Expand the Work Plan to reflect all Board Activities:

Who	What	Where	When	How	Why	Report to MHB
Miguel	Site Visit – meet with Prog. Mgr.	County Wellness Center	March 15, 2012 at 10AM	—	Goal: evaluate peer run ...	Regular MHB Mtg: April 1, 2012
Ron	Attends Finance Committee Meeting	County Admin Building	April 5 May 5 June 5 August 5	With MH Director and staff	Expand understanding of county finances	Quarterly update at MHB Mtg.
Sheron	Site Visit – Meet with Clinic Dir.	Hmong Women's Clinic	May 11, 2012 at noon	With Site Visit Ad Hoc Committee member	Goal: evaluate services for Hmong...	Regular MHB Meeting: June 1, 2012
Doretha	Chairs MHB CIT Committee	Sheriff's Dept.	June 22, 2012 at 9am		Increase awareness of	July 1, 2012 at MHB Mtg.
Fatima	Site Visit – Meet with Clinical Supervisor, Peer Staff	La Familia Counseling Center	July 18, 2012 at 9AM		Goal: evaluate services for Latino Youth and Families	Regular MHB Meeting: August 1, 2012

Developing an Annual Report

Practical Tips for Developing an Annual Report

- **Designate who will do the Report early!**

(Chairperson; Committee Chairs; etcetera);

Practical Tips for Developing an Annual Report

- Develop a Template for the Annual Report;
- Develop a Work Plan for the Annual Report;
- Creating ownership of the Annual Report → Build in a role for all members – even as editors!
- Remember: The report doesn't have to be fancy... it needs to show your adherence to your statutory roles and responsibilities to **Review, Evaluate and make Recommendations.**

Sample Components of an Annual Report

- State the LMHBC's goals and objectives for the year.
- Provide the basis for the Board's activities for the year (carried over from prior year; results of needs assessment; other);
- Provide description of the Board's activities and any findings resulting from these activities.

Sample Components of an Annual Report

- Focus of review and evaluation for the year.
- Highlight exemplary practices or services.
- Recommendations to improve and strengthen mental health services and programs.

Sample Components of an Annual Report

- Goals and objectives for the coming year.
- Personal “success” stories from service recipients to make the annual report more “real” and meaningful.
- Remember: Multiple viewpoints can be held and documented with rationale to support each view.

Sample Annual Report

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2010 XYZ County Behavioral Health Board Members
A Foreword from the Chair

Special Highlights

XYZ County Mental Health (KCMH) Director’s Report
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Sample Annual Report

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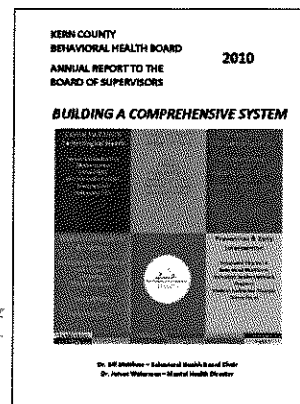
About Our Members
2010 Behavioral Health Board Committees
XYZ County Mission, Vision, and Values Statements Page 31
XYZ County Supervisorial District Map

After the Annual Report is completed:

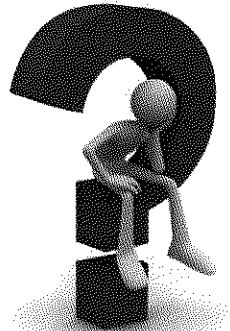
- Disseminate the Report with the support of the Mental Health Department.
- Tips for presentation to the Board of Supervisors
 - * Courtesy is to notify the Mental Health Director *prior* to approaching the Board of Supervisors.
 - * Communication is most effective when the Board speaks as one voice;
 - * Advocate for what will make things better, stronger, more effective;
 - * Know what you want to accomplish as a result of advocating;
 - * Develop and demonstrate strategic partnerships;
 - * Be respectful and courteous.

Kern County Behavioral Health Board 2010 Annual Report:

<http://www.co.kern.ca.us/kcmh/bhb/boardreports/BHB2010AnnualReport.pdf>



Questions... thoughts?



Thank you!

Contact information:

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